

**WISCONSIN DEPARTMENT OF HEALTH AND FAMILY SERVICES**  
**Division of Health Care Financing**  
**1 W. Wilson St.**  
**Madison WI 53702**

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To: Electronic Case File (ECF) Handbook Users

From: Jim Jones, Director  
Bureau of Eligibility Management

Re: **Electronic Case File (ECF) Release 05-04**

Release Date: December 23, 2005

Effective Date: December 23, 2005

**EFFECTIVE DATE**

The following process additions or changes are effective 12/23/05, unless otherwise noted. **Bold text in the new process section denotes new text. Text with a strike through it in the old process section denotes deleted text.**

**Changes**

**1.1.2 Viewing The ECF> ECF  
Access> Search Screen**

**New Process:**

**Note:** When entering text, always use CAPITAL LETTERS. The ECF database is case sensitive and will not find results for small letters. A best practice when using the Search function is to turn on your Caps Lock on the keyboard.

**Example:** A search for all Dane Co. cases using "Dane" or "dane" or "DAnE" in the county field will return no results. A search for "DANE" will return all electronic case files for cases in Dane Co.

**1.2.6 Viewing the ECF> ECF  
Image Manipulations Using  
the Viewer> Printing**

**New Process:**

To print a copy of an image created from an original 8 ½ by 11 document make the following page setup changes.

1. From the Gateway page browser window, click on FILE, then PAGE SETUP.
2. On the bottom of the PAGE SETUP panel you'll see MARGIN. Set all margins top, bottom, left, right to a value of 0.166.
3. Then click OK.
4. After retrieving the image, custom zoom the image size to 97%.
5. Click on the print icon; click OK in the print pop up box.

The image printed will be 97% of the original image with even margin spacing all around. This is the best print available from the ECF eClient application.

**1.5 Viewing The ECF> ECF  
Document List- Sorted by  
Document Type Spelled Out**

**New Process:**

SeniorCare documents were added to the OCNTY – (Other County Documents) code description. All SeniorCare documents should be coded as OCNTY in the ECF.

**1.6 Viewing The ECF> ECF  
Document List- Sorted by**

**New Process:**

SeniorCare documents were added to the OCNTY – (Other County

**Doc Code Abbreviation**

Documents) code description. All SeniorCare documents should be coded as OCNTY in the ECF.

**1.8 Viewing The ECF>  
Electronic Case file (ECF)  
Alphabetical Document Key**

**New Process:**

Documents starting with the letter "A" were inadvertently left out of this list. Those documents were added to the table in this section.

**2.9 Ascent Capture/  
Scanning> Uploading Images**

**Old Process:**

The RSA icon is located on the toolbar in the lower right of your screen. Clicking on this icon brings up the Remote Synchronization Agent pop up.

**New Process:**

The RSA icon is located on the toolbar in the lower right of your screen. Clicking on this icon brings up the Remote Synchronization Agent pop up. **When finished, do NOT click on the red X in the upper right corner of the RSA window. This closes the RSA and will prevent scanned images from being sent to the server until the RSA is reopened or the scan station PC is shut down and reopened. Instead, click on the "Hide" button at the bottom when finished looking at the RSA.**

**3.1 Technical  
Documentation> Fujitsu  
Scanner Documentation**

**New Process:**

A Cleaning and Maintenance Document was added for the 4340c model. This document doesn't exist for the other scanner models.

A Getting Started Document was added for the 4220c model. This document doesn't exist for the 4340c model.

**3.2 Technical  
Documentation> Adrenaline  
Card Documentation**

**New Process:**

A new column was added to this table that describes the physical size and type of the SCSI card for the scan station PC.

**3.3 Technical  
Documentation> Scanning  
Station PC Minimum  
Requirements**

**Old Process:**

These stations will require the use of large Adrenaline SCSI controller cards, which DHFS staff will install. The scan stations should be able to handle full sized hardware adapters/cards. See 3.2 Adrenaline Card Documentation for more information.

**New Process:**

These stations will require the use of large Adrenaline SCSI controller cards, which DHFS staff will install. The scan stations should be able to handle full sized hardware adapters/cards. **These PCI cards have 50 pins. Most desktop PC's accept this standard-sized PCI card. However, low profile cases will not be able to accept these cards.** See 3.2 Adrenaline Card Documentation for more information **on the cards.**

**3.4 Technical  
Documentation> ECF Rollout  
Schedule**

**New Process:**

This new section was added to let agencies know when they will have scanners installed in their agency. The link on this page goes to a PowerPoint presentation that will show the progress of the rollout. It will be continually updated throughout the ECF rollout.

**3.5 Technical  
Documentation> Checklist  
for the Scanner Install**

**New Process:**

This new section was added for ECF coordinators and IT staff to review before DHFS staff install the scanners in your agency.

- **Make sure the PC for the scan station is using Windows XP (preferred) or Windows 2000. It must meet all other requirements in the 3.3 Scanning Station PC Minimum Requirements.**
- **Make sure the internet connection to the PC is working on the**

day the scanner is installed.

- Make sure there is enough space at the workstation to install the scanner, PC, and monitor. The scanner is no larger than 4 feet by 2 feet.
- The table where the scanner is installed should be slightly lower than the pc, if possible. Scanning involves a lot of rotating and stretching. This will reduce strain on staff that do scanning.
- The scanner must be placed within a couple of feet from the PC.
- Have an IT staff person on site and available for problems that may occur with firewall settings (if any), installing the PCI card, internet issues, network passwords, etc.
- The installation process requires several hours at minimum and may take all day if problems arise. After a successful installation, state staff will provide training to staff that will be doing the scanning. Clear the schedules of these staff in the afternoon of the scanning install so they can attend this informal, hands-on training. Have these staff review chapter 2 Ascent Capture/Scanning of this handbook before the training.
- See 5.1 FAQs for answers to frequently asked questions about the ECF and the scanner installation process.

### 3.6 Technical Documentation> Agency Offices Remote Installation Procedures

This new section was added.

#### New Process:

Technical documentation for installing scanners and drivers for the ECF project in agencies is found in the [Remote Installation Procedures](#) document. This PDF document is used by DHFS staff during the initial installation of the scanner(s). It should also be used by agency IT staff if a reinstallation is necessary. It is not needed by line staff or supervisors.

### 4.1.3.3 Best Practices> Scanning Procedures (ESS)> Intakes

This section of the Best Practices chapter was removed since non-CARES cases should not be entered in CARES or the ECF. A CARES case number is required to enter documents into the ECF.

#### Old Process:

EA (Emergency Assistance) only applications should have the case run and denied. This will provide the case number needed in order to scan the EA application and supporting documents. You only need to include the primary person when keying the case. Put in case notes that you keyed the case for EA purposes and what other members were in the household.

#### New Process:

~~EA only applications should have the case run and denied. This will provide the case number needed in order to scan the EA application and supporting documents. You only need to include the primary person when keying the case. Put in case notes that you keyed the case for EA purposes and what other members were in the household.~~

### 5.1 FAQs> Frequently Asked Questions

#### New Process:

This new section was added to answer Frequently Asked Questions about the ECF project. Please read this section before your agency has the scanner(s) installed.

### Glossary

#### New Process:

New glossary definitions were added for “e-clipboard, wildcard, WAMS, batch, back file, document separator sheet, and RSA.” To see all glossary

words in the ECF, click on “Glossary” in the toolbar at the top of the ECF window. Glossary words also appear as hyperlinks to their definitions the first time they are used on a page in the ECF.